LIBRARY OF CALIFORNIA
2001/02 PLAN OF SERVICE
(Revised April 30, 2001)

Regional Library Network: _____Tierra del Sol Regional Library Network_____

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Name   Title

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Name:_____Kathleen F. Aaron_____ Date: _____

Title: _____President_____

Submit in 5 copies, 1 with original signature, by 4:30 p.m., Friday, May 25, 2001 to:

Mailing
Library of California – Plan of Service
California State Library - LDS
P.O. Box 942837
Sacramento, CA 94237

Shipping/Delivery
Library of California – Plan of Service
California State Library - LDS
900 N Street, Room 500
Sacramento, CA 9581
(916) 653-5217

Regional Library Network: ___Tierra del Sol Regional Library Network___

Program element:

18841. (Administration)

(a) Each regional library network shall establish a regional library council. Duties of the regional network council include overall administrative responsibility for the network, adopting an annual plan of service, assuring the appropriate expenditure of funds, and submitting annual budget proposals to the state board for implementation of the provisions of this article.
(b) Each regional network council shall elect from its membership a representative board to carry out its policies.
(c) Administration and management of the regional library network shall provide the vision and leadership necessary to perform the functions and deliver the services in a timely and satisfactory manner.

Describe in narrative form how the Regional Library Network will implement section 18841 (a), (b) and (c) including the following elements (use as many pages as necessary):

1. Program Description

The Administration Program is the backbone of the Regional operations. Administrative services are highly staff intensive. All services and communications provided to member libraries depend on administrative staff and operations money. The role of Administration is to:

- Promote and coordinate communications among all of the stakeholders
- Provide accounting and fiscal operations
- Provide materials and prepare required reports
- Support the Regional Board and Council
- Comply with state and federal regulations
- Maintain a database of members

The annual budget will be planned, administered and monitored by administrative staff. Administrative staff will be responsible for the proper accounting of income and expenditures.

The Administration Program will also plan and coordinate the Vendor Showcase and provide consortium pricing for a variety of databases.

Administration will be responsible for planning, coordinating and evaluating regional services, operations and programs. The long range and annual plans of service will be produced, monitored and revised as needed.

This budget would provide for a full time administrative assistant, a full time clerk and half time executive director and accounting support.

2

Regional Library Network: ____Tierra del Sol Regional Library Network____

2. Service Delivery Standard(s)/Measures

All of the required state and federal reports will be submitted in a timely manner. Agendas, meeting packets and minutes will be prepared for all required meetings.
An outside auditor and accountant will be retained to advise staff and recommend policies and procedures. Legal counsel will be retained.

3. Evaluation

Fiscal procedures will be audited annually. The Library of California Board and State Library staff will monitor and evaluate state reports.

The Tierra del Sol Regional Library Network Board and the Council will provide oversight and monitor activities. Staff will report on activities and financial status at each board and council meeting.

4. Budget, using the following categories:

Category	Regional Allocation
1. Personnel	128,200
2. Operations	93,963
3. Materials	0
4. Equipment > $5,000	40
6. Total	233,271

5. Describe whether this budget supports services and funding for all additional members and participating libraries that the region is submitting for approval at the Board's April meeting for membership beginning July 1, 2001.

This budget supports a minimum level of services and support for members and participating libraries in the region. It does not provide for the level of staff truly required to provide quality services to all members.

6. *(Optional)* Estimate the total amount of LoC funds needed to completely implement this service component to all regional members as of July 1, 2001.

Category	LoC Needed
1. Personnel	214,900
2. Operations	158,060
3. Materials	0
4. Equipment > $5,000	0
6. Total	372,960

LIBRARY OF CALIFORNIA NETWORK PLAN OF SERVICE

Regional Library Network: _____ Tierra del Sol Regional Library Network _____

Program element:

18842. (Telecommunications Infrastructure)

Each regional library network shall do all of the following:

(a) Make available a telecommunications system for the transfer of information and communications among its members.

(b) Provide regional communications based upon the most effective methods of exchanging information among its members.

(d) Provide online access to the information files, resources, and bibliographic records of its members which may be accessed regionally and statewide.

Describe in narrative form how the Regional Library Network will implement section 18842 (a), (b) and (d) including the following elements (use as many pages as necessary):

1. Program Description

> This budget level permits the maintenance of:
> - The telecommunications structure between the regional offices
> - The basic website
>
> This budget level also provides for training sessions for members on how to use Interlibrary Loan and other Intraregional services.
>
> Budget allow for the region to hire a Technology coordinator on a consultant/part-time basis.

2. Service Delivery Standard(s)/Measures

> The website will be updated on a monthly schedule. Statistical reports will be generated showing use patterns and volume of traffic on the website. Telecommunications devices will be monitored for successful receipt of messages.
>
> Training sessions will be completed by spring of 2002.

3. Evaluation

> Evaluation forms will be distributed at each training session. The website will include a survey form which will be mounted on the website for sample periods.

4

Regional Library Network: _____Tierra del Sol Regional Library Network_____

4. Budget, using the following categories:

Category	Regional Allocation
1. Personnel	23,000
2. Operations	18,842
3. Materials	0
4. Equipment > $5,000	0
6. Total	41,842

5. Describe whether this budget supports services and funding for all additional members and participating libraries that the region is submitting for approval at the Board's April meeting for membership beginning July 1, 2001.

> This budget supports only the telephone and Internet costs for the regional offices. It also supports minimum maintenance of the regional website.

6. *(Optional)* Estimate the total amount of LoC funds needed to completely implement this service component to all regional members as of July 1, 2001.

Category	LoC Needed
1. Personnel	170,000
2. Operations	350,000
3. Materials	0
4. Equipment > $5,000	110,000
6. Total	630,000

> With increased funding the Tierra Libraries Connect Project can go forward. This project would allow for a virtual union catalog, automated interlibrary loan and additional technological cooperation. For the region to continue to move forward with new technologies, a librarian with technical experience and expertise is necessary.

Regional Library Network: ___Tierra del Sol Regional Library Network___

Program element:

18842. (Regional Delivery)

Each regional library network shall do all of the following:

 (c) Provide intraregional delivery service based upon the most cost-effective methods for moving materials among its members.

Describe in narrative form how the Regional Library Network will implement section 18842 (c), including the following elements (use as many pages as necessary):

1. Program Description

> The present delivery schedule between the members of the two CLSA systems, Inland and Serra, will be maintained. This consists of contracted daily delivery within San Diego and Riverside Counties, once weekly delivery to Imperial County from San Diego County and twice a week delivery between Imperial County libraries. UPS and U.S. Mail serve distant libraries. The delivery will continue to include non-public libraries such as UC Riverside, SDSU, UCSD, CSU San Marcos, and Imperial Valley College. An additional delivery stop will be added connecting the San Diego and Riverside offices.

> The use of electronic delivery will be maximized whenever possible, including email, fax, toll free 800 voice and fax numbers, and high-speed DSL Internet connections.

> Service will be provided to new network members (not previously part of the CLSA systems or SIRCULS consortium of non-public libraries) based on the results of a needs assessment. A choice of delivery methods (UPS, USPO, courier) will be offered as appropriate. Guidelines, policies and procedures will be developed to determine frequency and schedules of delivery, criteria for materials to be sent and methods to be used, turnaround times, locations, and linkages to existing delivery systems.

> Interlibrary loan is being considered a part of the delivery services for the purposes of this plan. The current satellite offices of Inland and Serra at UCR and SDSU will be maintained. The needs of new members will be assessed. Alternate delivery methods and technologies will be surveyed and equipment upgraded as appropriate. Service to the existing CLSA member libraries will be maintained.

6

2. Service Delivery Standard(s)/Measures

90% of items delivered within 2 working days
Interlibrary loans will be filled or forwarded within 2 working days

3. Evaluation

Two-week survey period twice a year, counting number of items sent, originating libraries and destination, and turnaround time.
The merits and costs of different methods will be evaluated and recommendations made for adjustments.

4. Budget, using the following categories:

Category	Regional Allocation
1. Personnel	0
2. Operations	31,500
3. Materials	0
4. Equipment > $5,000	0
6. Total	31,500

5. Describe whether this budget supports services and funding for all additional members and participating libraries that the region is submitting for approval at the Board's April meeting for membership beginning July 1, 2001.

This budget will support only minimal service levels for non-CLSA member libraries in the network. It will not support the same level of service that is available to public libraries under the current CLSA systems. For instance, the public libraries in the urban population centers receive daily delivery. It is not feasible to offer the same schedule to a new member, regardless of the amount of material to be shipped. Increased funding would allow more frequent delivery service and the ability to choose the fastest method when appropriate rather than the cheapest. Lack of a daily delivery impacts other programs, such as the turnaround time for reference questions and interlibrary loan.

6. *(Optional)* Estimate the total amount of LoC funds needed to completely implement this service component to all regional members as of July 1, 2001.

Regional Library Network: Tierra del Sol Regional Library Network

Category	LoC Needed
1. Personnel	10,000
2. Operations	35,000
3. Materials	0
4. Equipment > $5,000	0
6. Total	45,000

The actual cost for delivery will increase with the implementation of anticipated services to members. The workload will be impacted with the addition of Reference and Interlibrary loan services. The implementation of a virtual union catalog with an interlibrary component will greatly impact the quantity and complexity of delivery services within the region.

Regional Library Network: Tierra del Sol Regional Library Network

Program element:

18845. (Training and Continuing Education)

Each regional library network shall provide opportunities for training and continuing education activities that encourage the most effective use of the resources and services authorized under this chapter, and that respond to the needs of its members in the effective delivery of services.

Describe in narrative form how the Regional Library Network will implement section 18845, including the following elements (use as many pages as necessary):

1. Program Description

The following training opportunities will be made available to staffs of member libraries:
- Newly licensed trainers will present at least 4 sessions of the three-day CORE Effective Reference Performance workshops in geographically distributed areas of the region.
- Training will be provided to Board members from agencies working with nonprofit corporations. The network has joined both San Diego and Riverside nonprofit support agencies that offer training.
- At least 6 sessions of a training module on using network services will be presented onsite for member libraries.
- Two different training programs on topics of interest to member libraries will be presented, each will be repeated 4 times in geographically distributed areas, for a total of 8 sessions. Staff will work with members and appropriate groups, such as Reference committees, to select topics and identify free and low cost trainers.
- The network will act as a clearinghouse of information from other training providers (InfoPeople, CLA, SANDAG, SANBAG, etc) to be distributed to member libraries.
- Temporary part time clerical staff will be employed as needed to take registrations, prepare materials and other support functions.

2. Service Delivery Standard(s)/Measures

Number of different workshop topics provided, number of sessions offered.
Number of attendees at each workshop session.
Library affiliations of staff attending workshops

3. Evaluation

9

Regional Library Network: <u>Tierra del Sol Regional Library Network</u>

        -Standardized evaluation forms will be distributed at each event and the
results tabulated and distributed.
Suggestions will be solicited from member libraries and staffs for training
topics and needs.

4. Budget, using the following categories:

Category	Regional Allocation
1. Personnel	0
2. Operations	12,500
3. Materials	0
4. Equipment > $5,000	0
6. Total	12,500

 5. Describe whether this budget supports services and funding for all additional members and
participating libraries that the region is submitting for approval at the Board's April meeting for
membership beginning July 1, 2001.

        This budget will support a minimal number of training events and very little
staff support. Without additional funding, professional trainers and
speakers who charge fees may not be an option. Staff in more remote
library locations will not be able to attend sessions too distant for
convenient travel. More funds would allow for more workshops on
different topics and increased repetition of workshops across the network's
geographic area. More funds and staff would also provide the opportunity
to explore distance-learning options such as online or video conferencing.

6. *(Optional)* Estimate the total amount of LoC funds needed to completely implement this
service component to all regional members as of July 1, 2001.

Category	LoC Needed
1. Personnel	26,500
2. Operations	43,000
3. Materials	0
4. Equipment > $5,000	0
6. Total	69,500

Regional Library Network: _____Tierra del Sol Regional Library Network_____

Program element:

18846. (Information and Referrals)

(a) Each regional library network shall provide information and referrals to answer requests that are beyond the capacity or capability of its members by accessing the resources and expertise of other libraries, improving general reference service in participating libraries, and improving reference service to respond to the needs of the underserved populations in the region.

Describe in narrative form how the Regional Library Network will implement section 18846, including the following elements (use as many pages as necessary):

1. Program Description

> The Network will maintain the present service levels to CLSA System members until funding is augmented to allow expansion. Policies and procedures for handling reference questions will be written and approved. Implementation of reference service for Tierra del Sol will begin after policies and procedures are in place. A reference manual for the use of network member libraries will be written and distributed.

> The Network will contract with the CLSA systems for reference services to new nonpublic library members. The functions and procedures of the two reference centers will be integrated for effective operations. The Thalia statistical software will be networked. Electronic communication to and from the reference centers will be upgraded. Electronic and fax reference forms will be created and used by member libraries.

> New staff will be recruited and hired as funding allows. The first priorities are a half time Reference Coordinator and two half time reference librarians, one at each reference center. Contracts will be developed with specialized reference service providers, such as subject experts.

> Reference staff will coordinate with the Training Services Module on reference training of new members for staff development.

> Interlibrary loan services as an adjunct of reference will be provided. Policies and procedures will be developed, reviewed and implemented. Members will be informed of the service and the process for access.

2. Service Delivery Standard(s)/Measures
> 70% of questions answered in 10 working days or less
> 90% of questions answered

11

Regional Library Network: Tierra del Sol Regional Library Network

3. Evaluation

Annual survey of member library staff satisfaction with service
Annual survey of patron satisfaction with service
Quarterly reporting of statistics on number of questions answered, subjects of requests, libraries submitting requests, turnaround time
Turnaround time and number of questions will be analyzed. Appropriate actions may be taken to maintain effective operations and response time.

4. Budget, using the following categories:

Category	Regional Allocation
1. Personnel	
2. Operations	160,729
3. Materials	0
4. Equipment > $5,000	0
6. Total	160,729

5. Describe whether this budget supports services and funding for all additional members and participating libraries that the region is submitting for approval at the Board's April meeting for membership beginning July 1, 2001.

This budget supports developing the infrastructure and policies for reference service but does not allow for the level of service to non-CLSA members as is currently available to CLSA system members. Funding limitations may lead to service limitations. Reference is a labor-intensive service and increased staff is needed to handle increased workload. With better funding staff will be increased to include a full-time reference coordinator, two full-time reference librarians, two full-time library assistants and two full time library clerks could be hired to implement full reference services without limitations and with enhancements, such as a quick deadline service, 24/7 service, publications, and additional online database subscriptions.

6. *(Optional)* Estimate the total amount of LoC funds needed to completely implement this service component to all regional members as of July 1, 2001.

Category	LoC Needed
1. Personnel	289,000
2. Operations	174,575
3. Materials	0
4. Equipment > $5,000	0
6. Total	463,575

LIBRARY OF CALIFORNIA NETWORK PLAN OF SERVICE

Regional Library Network: ___Tierra del Sol Regional Library Network___

Program element:

18847. (Public Awareness)

Each regional library network shall augment the public awareness programs of its members by providing public relations packages to them for customization and dissemination.

Describe in narrative form how the Regional Library Network will implement section 18847, including the following elements (use as many pages as necessary):

1. Program Description

>A public relations plan will be developed. The target audiences and messages will be identified. A Public Relations firm will be retained to develop a corporate identity and manage a public relations campaign. The firm will produce written communications and handle media relations.

>Tierra del Sol services will be promoted to current and potential members, legislators and other regions of the state.

2. Service Delivery Standard(s)/Measures

>At least four press releases will be distributed.
>Information packets for prospective members will be produced and distributed.
>All materials distributed will convey the corporate identity.
>A 10 percent increase in regional membership this fiscal year

3. Evaluation

>Successful placement in relevant media
>Was the increase in membership met?

4. Budget, using the following categories:

Category	Regional Allocation
1. Personnel	0
2. Operations	23,000
3. Materials	0
4. Equipment > $5,000	0
6. Total	23,000

Regional Library Network: _____ Tierra del Sol Regional Library Network

5. Describe whether this budget supports services and funding for all additional members and participating libraries that the region is submitting for approval at the Board's April meeting for membership beginning July 1, 2001.

> This budget supports only minimal public relations activities. With additional funding, a newsletter could be published and a more vital public relations campaign could be conducted. Staff could be hired to manage all public awareness activities and fundraising to support regional services.

6. *(Optional)* Estimate the total amount of LoC funds needed to completely implement this service component to all regional members as of July 1, 2001.

Category	LoC Needed
1. Personnel	25,000
2. Operations	42,000
3. Materials	0
4. Equipment > $5,000	0
6. Total	67,000

Regional Library Network: Tierra del Sol Regional Library Network

SUMMARY PAGE

1. Consolidated budget. Please summarize all program budgets in this final table:

Category	Regional Allocation
1. Personnel	244,200
2. Operations	261,642
3. Materials	0
4. Equipment > $5,000	0
6. Total	506,342

2. Anticipated membership 2002/03

Attachment A is a table reflecting Library of California Memberships approved by the Library of California Board at its February 2001. For the purpose of planning, please estimate the number of members and participating libraries in your regional network for the ***2002/03 fiscal year***, including the numbers indicated in *Attachment A*.

Library Type	2001/2002	2002/2003
Academic Library Members	24	25
Participating libraries	38	35
Public Library Members	31	32
Participating libraries	164	171
School District/Independent Members	15	20
Participating libraries	48	120
Special Libraries Members	20	25
Participating libraries	25	34
Total Members	**90**	**102**
Total Participating	**275**	**360**

3. Resource sharing support

If possible, please provide an estimate of how much the network budget that supports the 2001/02 Plan can be said, in the broadest sense, "to reimburse libraries to share their materials with each other," and define which programs and services that dollar figure reflects.

>   This budget does not provide any significant reimbursement to member
>   libraries for the sharing of materials

Regional Library Network: Tierra del Sol Regional Library Network

The following table indicates the total amount of LoC funding needed for the Tierra del sol Regional Library Network to provide a basic level of services.

LoC Funding needed for Basic Services in the 2001/2002 fiscal year	
Administration	372,900
Telecommunication	630,000
Regional Delivery	45,000
Training	69,500
Reference	463,575
Public Awareness	67,000
TOTAL	**1,647,025**